

NC eProcurement

Managing a Sourcing Event

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOLS
NORTH CAROLINA ePROCUREMENT PURCHASING
ONLINE SHOPPING STATEWIDE TERM CONTRACTS
ELECTRONIC VENDOR PORTAL HUB CERTIFIED VENDOR
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

A Sourcing Event is the most important part of a Sourcing Project. It is where the buyer can establish the bidding dates and time, as well as compile all pertinent information to which the vendors will need to respond, as guided by a template established by the State. Notification of this Event can then be posted in IPS so that interested vendors can respond electronically in a consistent format and that questions and answers can be exchanged through the Sourcing Event if further clarification is needed by either side. Finally, responses can be reviewed, and a contract can be awarded.

I. Create a Sourcing Event

1. Navigate to the **'Documents'** tab of the Sourcing Project and click the down-arrow to the right of the document within the **'Sourcing Event'** folder and click **'Edit'** from the drop-down menu.

Note: This document template will depend upon the selection made in the **'Solicitation Vehicle'** field when creating the Sourcing Project.

Example Sourcing Services Project

Sourcing Project

ID: WS82296004
Tasks: Incomplete Tasks: 0
Current Phase: 01 - LAUNCH PROJECT

Overview Documents Tasks Team Message Board Event Messages History

Example Sourcing Services Project

Name	Owner	Status
▶ Sourcing Project Documents	Project Owner	
▶ Solicitation Document	Project Owner	
▶ Sourcing Event	Project Owner	
▶ Non-IT RFP Agency for Services Sourcing Event Template	Project Owner	Not Created

View Details Edit Create New Task To Do

Click the down-arrow next to the pre-loaded Sourcing Event Template, then click 'Edit' in the dropdown menu.

2. The **'Edit Event'** page will display. It is important to populate the **'Title'** and **'Description'** with pertinent information, keeping in mind that the **'Title'** will be visible to vendors who choose to respond within the tool, and the **'Description'** can be up to 120 characters and will be pasted in the IPS **'Summary'** field to provide the vendor community its first idea of what goods or services are needed.

Select **'No'** for the **'Test Event'** field and leave the other fields as is. **'Currency,' 'Commodity,'** and **'Departments'** will be pre-populated based on selections made when creating the Sourcing Project. Then click **'OK.'**

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- The 'Event' page will display and will outline the four sections to be completed before publishing the Event: 'Rules,' 'Suppliers,' 'Content,' and 'Summary.'

Note: The Event will be assigned a 'Doc Number' by the system immediately preceding the Event 'Title' entered on the previous page. This 'Doc Number' will be used as the IPS 'Solicitation Number' following the user's entity-specific numerical prefix (i.e., 13-Doc82296023 for DOA).

III. Handling Participants in the ‘Suppliers’ Section

At the time of publication, the process for handling Event participants has not been finalized. Please check back later for more details.

IV. Updating the Sourcing Event Content

The ‘**Content**’ section of the Event is where the user can share all information about the products or services they wish to receive bids on, as well as provide a framework of questions for vendors to answer to help the buyer choose the most-deserving bidder to award the contract to. The State has created an extensive template in this section, and it is advised that users follow the suggested outline.

1. The ‘**Content**’ stage is divided into seven numerical sections, some of which have subsections:
 - 1) **Welcome to the State of North Carolina’s Sourcing Tool:** A brief welcome message for vendors.
 - 2) **Instructions and How to Use the Sourcing Tool:** Instructions and tips for vendors on how to provide a response within the tool.
 - 3) **Solicitation Document and Details:** Users will upload their completed ‘**Solicitation Document**’ in section 3.1. Vendors will find a pre-loaded template for submitting questions in section 3.2. If the user needs to respond with an ‘**Addendum**,’ they will post it here and it will become section 3.3.
 - 4) **Vendor Information:** This section requires vendors provide their ‘**Customer Number**’ from their NC eVP account, and the answers will be provided in ‘**Envelope 1.**’
 - 5) **Pricing Submittal:** The user will upload a customized pricing response template that vendors will download, complete with the prices they are bidding on the requested products or services, and re-upload to the Event as an attachment. This information will be available to view by the user in ‘**Envelope 2.**’
 - 6) **Vendor Responses:** This section has 27 default sub-sections consisting of general questions and information requested from the vendors by the State to accompany their pricing submittal. Some questions can be answered with free-text, while other fields provide the vendors with a drop-down menu or the ability to add an attachment. All questions are required to be answered by default. These answers will be visible in ‘**Envelope 1.**’
 - 7) **Additional Questions to Vendor:** Vendors can provide additional information such as a further description of their qualifications or up to three references. These answers will also be visible in ‘**Envelope 1.**’

Note: Section 7 will only not display for ‘**Goods**’ Solicitations.

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- Section 3, '**Solicitation Document and Details**,' is the first section a user needs to update. A '**SAMPLE BLANK DOCUMENT.doc**' is attached to 3.1 by default. The user can click on this document and download it, but that is not necessary, as it is simply a blank placeholder. Instead, click on the blue text in the body of 3.1 and select '**Edit**' from the subsequent dropdown menu.

Event Doc82296023 - Example Sourcing Event

On this page you create the information that participants will read and respond to during events. Add different types of content to re-create the traditional sourcing [More](#)

All Content [Filter](#)

1 Rules

2 Suppliers

3 Content

4 Summary

3 Solicitation Document and Details

This section contains the details of the Solicitation, including details on the intent, use, duration, and scope of the goods and / or services being requested, information on the Solicitation process and instructions on how to respond, and the State's terms and conditions. Any issued Addenda to this Solicitation will be posted in this section.

3.1 This document includes details on the intent, use, duration, and scope of the goods and / or services being requested, information on the solicitation process and instructions on how to respond, and the State's terms and conditions. [SAMPLE BLANK DOCUMENT.doc](#)

3.2 Vendor Question Template - Vendor shall submit any questions it may have regarding this Solicitation or the Solicitation process in the Sourcing Tool's provided Vendor Question Template. Written questions concerning this Solicitation will be received until the date and time listed in the Schedule Section of this Solicitation. [Vendor Question Submission Template.xlsx](#)

3.3 Vendor Identification

3.4 Vendor Identification

This section requires Vendor to providing identifying information.

Click the blue text in the body of sub-section 3.1, then click 'Edit' in the subsequent dropdown menu.

- The '**Edit Attachment**' page displays. Click '**Update file**' next to the '**SAMPLE BLANK DOCUMENT.doc**' file, then attach the finalized Solicitation Document by selecting either '**Upload a file from desktop**' if it's most easily accessed there, or '**Select file from library**' to pull it from the '**Documents**' tab of the overall '**Sourcing Project**.' When the actual document is attached, click '**Done**.'

Enter information about this question or term and specify all values that apply.

3 - Solicitation Document and Details

This document includes details on the intent, use, duration, and scope of the goods and / or services being requested, information on the solicitation process and instructions on how to respond, and the State's terms and conditions.

DOCUMENT.doc

Update file

Upload a file from desktop

Select file from library

Reference Documents: [Attach a file](#)

Visible to Participant: Yes

Click 'Update file' (slightly hidden by popup menu) to replace the default document, then select the source of the completed 'Solicitation Document,' either the desktop or the 'Documents' folder.

- There is no necessary action in Section 4. Note the envelope icon next to the number and hover the cursor over it to display in which envelope that section's answers will be revealed.

Event Doc82296023 - Example Sourcing Event

On this page you create the information that participants will read and respond to during events. Add different types of content to re-create the traditional sourcing [More](#)

All Content [Filter](#)

1 Rules

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3.1 This document includes details on the intent, use, duration, and scope of the goods and / or services being requested, information on the solicitation process and instructions on how to respond, and the State's terms and conditions. [SAMPLE BLANK DOCUMENT.doc](#)

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3.3 Vendor Identification

3.4 Vendor Identification

This section requires Vendor to providing identifying information.

Hovering over an envelope icon will display in which envelope that section's information will be revealed when reviewing the bids.

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5. In Section 5, Vendors will attach their pricing responses to the products or services being bid upon. The user must provide a template for vendors to populate. In **5.1**, duplicate the steps performed in **3.1** by clicking on the blue text in the body and selecting **'Edit'** from the dropdown menu.
6. Navigate to the **'Reference Documents'** field and click the **'Attach a file'** link. Add the Pricing Submittal template the vendor needs to fill out, either from the desktop or the **'Documents'** tab if it has been saved there, and click **'Done.'** Vendors are instructed to download this template to fill out with their pricing and re-upload it for the user to review in **'Envelope 2.'**

Enter information about this question or term and specify all values that apply.

5 - Pricing Submittal / 5.1 - Pricing Submittal - Vendor shall d...

Name: *

Pricing Submittal - Vendor shall download, complete, and upload an Excel file that is available by clicking on the instructions on the first worksheet of the Excel file.

Is this a prerequisite question to continue with the event? No

External Field Mapping:

Answer Type: Attachment

Response Required? Yes, Participant Required

Reference Documents: **Attach a file** Upload a file from desktop Select file from library

Visible to Participant: Yes

Click **'Attach a file'** (slightly hidden by popup menu) next to the **'Reference Documents'** field to upload a Pricing Submittal template for the vendors to fill out.

7. Section 6 contains numerous questions for vendors to answer accompanying their pricing submittal. By default they are all required, however, if necessary, they can be edited or deleted, although this is not advised.
8. To delete a question, check the box to the left of that question and click the **'Delete'** button at the bottom of the **'Content'** section. The question will be removed (it cannot be undeleted), and the subsection numbering below it will automatically adjust.

Answer Unspecified

6.8 CERTIFICATION OF FINANCIAL CONDITION

Vendor certifies that it is in sound financial condition and, if applicable, has received an unqualified audit opinion for the latest audit of its financial statements.

Answer Unspecified

6.9 If Vendor answered No to above question, Vendor shall explain the reason.

No.

Add Edit **Delete** Excel Import Smart import from Excel (*) indicates a required field

Check the box next to the subsection to be deleted and click the **'Delete'** button at the bottom of the screen.

9. To edit a question, check the box to the left of that question and click the **'Edit'** button at the bottom of the **'Content'** section. From the subsequent dropdown menu, click **'Content.'**

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- The **'Edit Question'** page will display. It is highly advised that no edits be made to these questions. One potential field to change is the **'Response Required?'** field. This field defaults to **'Yes, Participant Required,'** but if the user would like to keep the question but not make it a mandatory one for the vendor, they can select **'Not Required'** from the dropdown menu and click **'Done.'**

The screenshot shows the 'Edit Question' page. At the top, there is a question: 'Is this a prerequisite question to continue with the event?' with a dropdown menu set to 'No'. Below this, there is a section for 'External Field Mapping' with several dropdown menus: 'Answer Type' (set to 'Yes / No'), 'Response Required?' (set to 'Yes, Participant Required'), 'Reference Document' (set to 'Not Required'), and 'Visible to Participant' (set to 'Yes, Participant Required'). A yellow callout box points to the 'Response Required?' dropdown menu, stating: 'After selecting **'Edit'** next to a particular sub-section, the **'Response Required?'** field can be altered so that question is no longer required by default.' A dashed oval highlights the 'Response Required?' dropdown menu.

- If the user cannot complete all four sections of the Event in one sitting, they can click the **'Exit'** button at the top or bottom of the screen and will be presented with a few options. The top options will save the progress made, and the user will be able to revisit and complete the Event before eventually publishing it. The top option is the suggested action. The bottom option to **'Create saved version'** will save the progress made as a separate version, and the screen will include instructions on how to undo any subsequent changes. The bottom option works if desired but is generally unnecessary.

The screenshot shows the 'Confirm Edit Event Exit' screen. At the top, there is a section titled 'What would you like to do next?' with three options: 'Continue working on this event.', 'View details or return to project.', and 'Create saved version and exit.'. A yellow callout box points to the 'Continue working on this event.' option, stating: 'The top options on the **'Confirm Edit Event Exit'** screen will save the Event as is, and that is the suggested course of action, while the bottom option will save the progress made as a separate version.' A dashed oval highlights the 'Continue working on this event.' option. Below the options, there is a note: 'Your edits have automatically been saved as you work. Others cannot edit the event.' and another note: 'Prior to publishing, you are allowed to create saved versions or 'checkpoints' of your work on an event. Once you have a saved version, you can undo any subsequent changes by selecting **Actions > Revert to Saved Version** while viewing the event.' At the bottom, there is a note: 'NOTE: You can only revert to the last saved version that was created.'

V. Summary Section and Publishing the Event

The fourth and final section in the Event is the **'Summary.'** This contains the summary of the first three sections and allows the user to review and edit before adding a mandatory approver and clicking **'Submit'** to Publish the Event.

- The **'Overview'** information is at the top of the page, above the **'Rules,' 'Suppliers,'** and **'Content'** information in descending order. To edit any of the **'Overview,'** click the **'Actions'** button and select **'Edit Overview'** from the dropdown menu. If any other sections need to be edited, click on that section on the left side of the screen.
- For a summary of the entire contents of the Event in the form of a MS Word document (which may be helpful to refer to when posting Event information to IPS), click the **'Actions'** button and select **'Print Event Information,'** and the system will generate an up-to-date, time-stamped document.

Note: Avoid clicking the **'SAP Ariba Review'** button.

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Event Doc82296023 - Example Sourcing Event

Review and revise your event

Before you can submit this event for publish approval, you must add approvers.

Overview

ID: Doc82296023

Description: Health Care Services Example ⓘ

Status: Draft ⓘ

Version: v1 (editing)

Owner: SourcingUser01 ⓘ

Editors:

Event Type: RFP

Test Event: No

Template: Non-IT RFP Agency for Services Sourcing Event Template

Base Language: English

Commodity:

Regions:

Departments:

Last Modified: 09/10/2020

Currency: US Dollar

Creation Date: 09/09/2020

Access Control: (No additional restrictions) ⓘ

Actions

Edit Overview

View Publish Approval Task

Customize Messages

Print Event Information

- The 'Submit' button will be greyed-out and inactive until an approver is added to the Event if one wasn't already added by default (when the amount entered in the Sourcing Project Attributes 'Estimated Annual Contract Value' field is \$1,000,000 or more, P&C is automatically added as an approver). To do so, click the 'View Approvers' link above the 'Overview' section.

Event Doc82296023 - Example Sourcing Event

Before you can submit this event for publish approval, you must add approvers: View Approvers

Overview

- The 'Approval Task' page will display. Click the 'Add Initial Approver' button.

Approval Task

The document associated with this task is in **Draft** status. **Update** the document as necessary and then mark this task **In Progress**. Notification on More

Example Sourcing Services Project / 04 - DEVELOP SOURCING EVENT / Gain Approval of Sourcing Event

TSK82296042 Gain Approval of Sourcing Event Round 1: Not Started ⓘ

Example Sourcing Event

Cannot initiate a task on documents with a Not Generated or Not Edited state. Update the document's state to Draft, then start the task.

Properties Task History Approval Flow

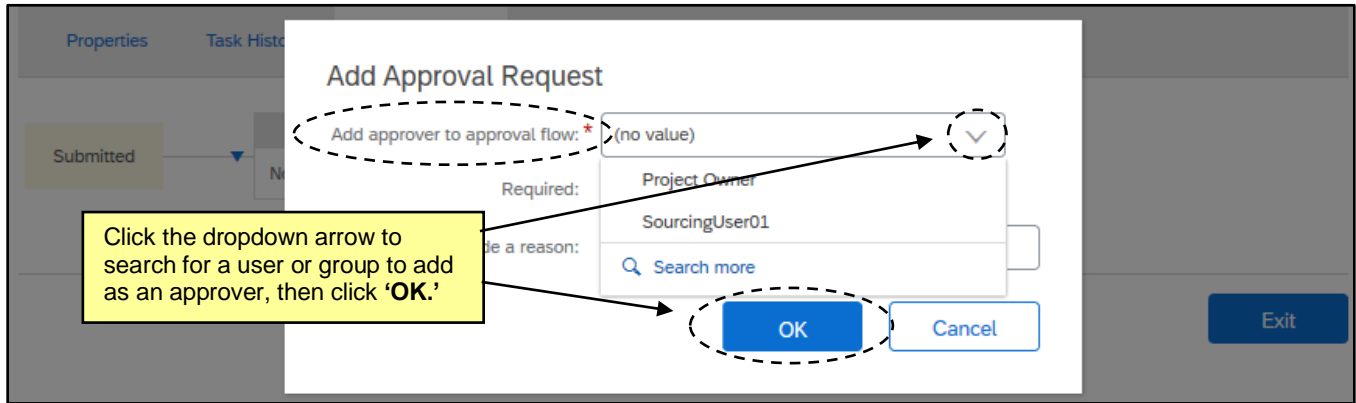
There are no approvers or reviewers.

Submitted Add Initial Approver Approved

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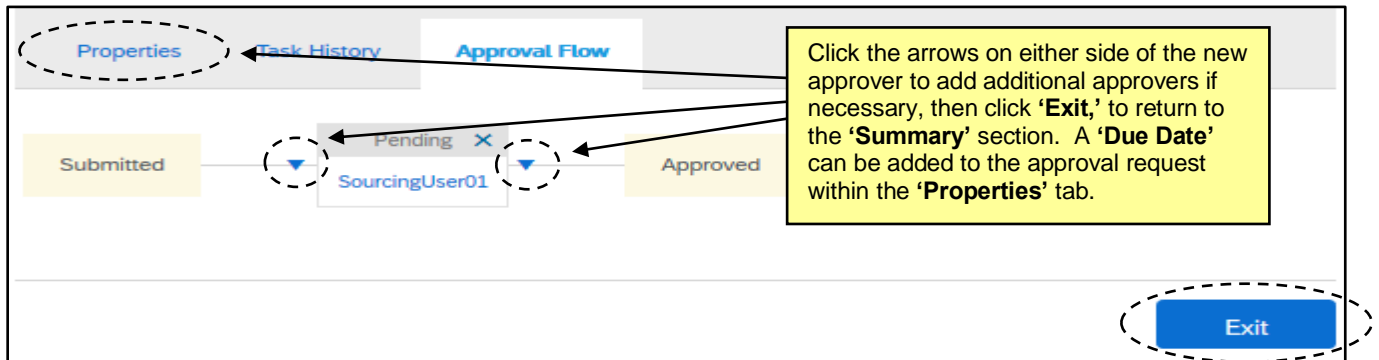
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- Click the arrow to the right of the **'Add approver to approval flow'** field and select the appropriate user or group needing to approve the Event from the dropdown menu. When selected, click **'OK.'**

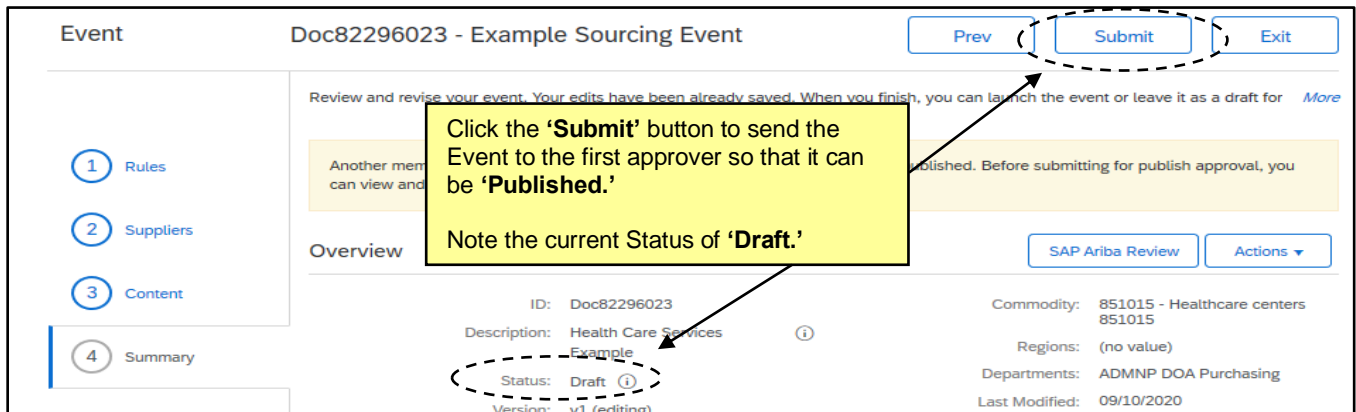


- The new approval flow will display, and additional approvers can be added in sequence by clicking the blue arrows before or after the **'Pending'** approver. Click **'Exit'** to return to the **'Summary'** section.

Note: Clicking on the **'Properties'** tab and adding a **'Due Date'** for the approval will send the approval request to the approver's **'Notifications'** portlet as well as sending the standard email.



- The **'Submit'** button is now active and can be clicked to **'Publish'** (pending approvals) the Event. Until that time, the Event will remain in **'Draft'** status.



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- The **'Event Submitted for Approval'** page displays, and the user will have the option to return to the Event or go back to the overall Project. Upon returning to the Event, the user will find five tabs at the top of the screen. **'Overview'** is the default tab, and that is where the **'Rules'** are summarized along with a **'Version History'** section towards the bottom and any **'Tasks'** associated with this Event, including the recent **'Approval'** request will be displayed at the very bottom.
- Other tabs include **'Content,' 'Suppliers,' 'Messages,'** and **'Log.'** Until the Event has been fully approved, the Status will be listed as **'Pending Publish Approval.'** Clicking the **'Actions'** button will display several options including **'Edit'** to make any necessary changes and **'View Project'** to navigate directly to the Sourcing Project within which this Event exists.

Doc82296023 - Example Sourcing Event

Overview Content Suppliers Messages Log

Status: Pending Publish Approval

Version: v2

Version Comment:

Owner: SourcingUser01

Editors:

Event Type: RFP

Test Event: No

Template: Non-IT RFP Agency for Services Sourcing Event Template

Actions

Document

Edit

Excel Export

Print Event Information

View Publish Approval Task

Copy

Move

Publish As Quick Link

Delete

Unlock

Download All Supplier Attachments

View Project

New tabs at the top, along with a new **'Status'** while the Event is waiting for approval.

The **'Actions'** dropdown allows users to select options like **'Edit'** and **'View Project.'**

- Once the Event has been approved, it becomes **'Published,'** and based on the timing rules established, it may immediately be **'Open'** to receive bids, as is the case below. A clock will appear in the upper right counting down how much time is left until the bidding period is closed. Two new tabs will also appear: **'Discovery Suppliers,'** and **'Award,'** although both of these tabs can be ignored.

Doc82296023 - Example Sourcing Event

Overview Content Suppliers Discovery Suppliers Messages Log Award

Status: Open

Version: v2

Time remaining 14 days 23:53:11

A countdown clock until the end of the bidding period appears, the status goes to **'Open.'**

VI. Managing a Published Event and Responding to Vendor Questions

Once the Event has been approved, **Phase 4** of the Sourcing Project will automatically be recorded as complete as noted by a checkmark. The first task in **Phase 5** is to '**Post Sourcing Event Summary and Link to Sourcing Event on IPS.**' Posting the link within IPS will give vendors interested in responding the ability to access the Event via their Ariba Network accounts and a path to an electronic response. During the Event, if responders have any questions, they will submit them via the Event message board, and if necessary, the user can address those questions by posting an '**Addendum**' in the Event before responders submit their final bids.

1. From the '**Documents**' tab on the Sourcing Project, click on the Event document and select '**Monitor**' from the dropdown menu.

The screenshot shows the SAP Sourcing Project interface. On the left, there's a 'Related Knowledge' sidebar with links to 'Expand Projects', 'All Knowledge Areas', and 'Search Knowledge'. The main area is titled 'Example Sourcing Services Project' with a sub-header 'Sourcing Project'. It includes a navigation bar with tabs: Overview, Documents, Tasks, Team, Message Board, Event Messages, and History. The 'Documents' tab is active. Below it, a table lists documents: 'Sourcing Project Documents', 'Solicitation Document', 'Sourcing Event', and 'Example Sourcing Event'. The 'Example Sourcing Event' document is selected, and a dropdown menu is open, showing options: 'Doc', 'Action', 'Monitor', and 'Create New Task'. A yellow callout box points to the 'Monitor' option, stating: 'From the 'Documents' tab on the Sourcing Project, click on the Event document and select 'Monitor' from the dropdown menu.'

2. Go to IPS and populate the Solicitation Posting as instructed by P&C. Remember that the '**Solicitation Number**' field will be the user's numerical Entity number followed by the system-generated '**Doc Number**' given in the Sourcing Event and that the '**Summary**' field accepts up to 120 characters of the Event '**Description**.'
3. If a vendor has any questions during the Q&A period, the vendor is instructed to submit them on a template provided in the '**Contents**' and notify the user via the Event message board. A notification will appear on the home page when a message is received, or check the '**Messages**' tab on the Event at any time. Click on the '**Subject**' of the new message to read the message and note the attachment icon on the left side.

The screenshot shows the SAP Sourcing Event interface for 'Doc82296023 - Example Sourcing Event'. It includes a navigation bar with tabs: Overview, Content, Suppliers, Discovery Suppliers, Messages, and Log. The 'Messages' tab is active. Below it, there's a 'Filter by Label' dropdown set to 'All' and a 'Manage Labels' link. A table lists messages with columns: Id, Reply Sent, Sent Date, From, Contact Name, To, Labels, and Subject. The first message, 'MSG1515129', is highlighted. A yellow callout box points to the 'Subject' column, stating: 'From the Event 'Messages' tab, click on the 'Subject' of the new message and note the attachment icon on the left.'

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- The **'View Message'** page will display, and the user can download the vendor's question attachment document and read their message at the bottom of the page.

View Message

Id: MSG1515129
From: NC Test Vendor (State Supplier)
Sent: 09/11/2020 01:24 AM
To: Project Team; NC eProcurement - TEST(SourcingUser01)
Subject: Sourcing Event Questions
Labels: (no value) select

Viewed By: NC eProcurement - TEST(SourcingUser01)
Attachment: Vendor Question Submission Template.xlsx

Please see my questions in the attached document

Download the vendor's attachment to view their questions and read their message at the bottom of the page.

- When the Q&A period is over and all vendor questions have been reviewed, the user may need to create an **'Addendum'** to address the questions. From the **'Documents'** tab on the Project, expand the **'Sourcing Project Documents'** folder, then click on the **'Addendum Document Template'** link and select **'Download.'** Fill the document out, rename it, and save it back into the Project.

Example Sourcing Services Project

ID: WS82296004
Tasks: Incomplete Tasks: 0
Current Phase: 01 - LAUNCH PROJECT

Overview Documents Tasks Team Message Board Event Messages History

Example Sourcing Services Project

Show Details Actions

Name Owner Status

Sourcing Project Documents

Proposal Evaluation Kick-Off Meeting Template

Addendum Document Template

Action template

Download template

View Details

Edit Attributes

Copy

Expand the 'Sourcing Project Documents' folder, then click on the 'Addendum Document Template' link and select 'Download.'

- 'Monitor'** the Event again from the Project's **'Documents'** tab, and then navigate to the Event **'Content'** tab. Click the **'Actions'** button in the top right and select **'Edit'** from the dropdown menu.

Doc82296023 - Example Sourcing Event

Overview Content Suppliers Discovery Suppliers Messages Log Award

All Content Filter

Name

Totals

1 Welcome to the State of North Carolina's Sourcing Tool

Welcome to the State of North Carolina's Sourcing Tool, which is intended to streamline the solicitation process for both the State and vendors.

Vendors may review the details of this solicitation in the attached document found in Section 3. This includes details on the intent, use, and services being requested, information on the solicitation process and instructions on how to respond, and the State's terms and conditions of responses and upload the applicable completed documents for submission to the State in Sections 4, 5, 6, and 7.

2 Instructions on How to Use the Sourcing Tool

Timing

Pause Event

Extend Timing

Reduce Timing

Stop Event

Cancel Event

Document

Edit

Open Envelope

Choose suppliers for next envelope

Excel Export

Print Event Information

View Publish Approval Task

Copy

Move

Click the 'Actions' button (obscured by the dropdown menu) in the top right of the 'Content' tab, and then click 'Edit.'

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- Click the **'Content'** link on the left side of the screen, click on the **'Solicitation Document and Details'** link next to **3**, and select **'Attachment'** from the **'Add'** dropdown menu.

Event Doc82296023 - Example Sourcing Event

On this page you create the information that participants will read and respond to during events. Add different types of content to re-create the traditional [More](#)

All Content [Filter](#) Display: [Edit Item](#) [Actions](#) [List](#) [Dropdown](#)

☐ Name

1 Rules

2 Suppliers

3 Content

4 Summary

3 Solicitation Document and Details

Add

- Section
- Table Section
- Lot
- Line Item
- Question
- Requirement
- Attachment**
- Cost Terms

Tool's message board. Questions or issues related to using the Sourcing Tool itself can be directed to the North Carolina eProcurement Help Desk at 888-211-7440. Option 2. Help Desk representatives are available Monday through Friday from 7:30 AM EST to 5:00 PM EST.

Tips for Using the Sourcing Tool

- Vendors should review available training and content well in advance of the date and time response are due.
- Vendors may submit their responses early to make sure they meet the response due date and time. The State will only review responses that are submitted by the response due date and time.
- Questions or items that are required are denoted with a red asterisk (*). All required items are completed. The Sourcing Tool will not allow a response to be submitted until all required items are completed.
- Simply saving your response in the Sourcing Tool is not the same as submitting your response to the State. Vendors should make sure they complete the submission process and receive a message that their response was successfully submitted.

Details of the Solicitation, including details on the intent, use, duration, and scope of the goods and / or services being requested, information on the Solicitation process and instructions on how to respond, and the State's terms and conditions. Any information will be posted in this section.

Details of the Solicitation, including details on the intent, use, duration, and scope of the goods and / or services being requested, information on the Solicitation process and instructions on how to respond, and the State's terms and conditions. [Completed Solicitation Doc.docx](#)

Vendor shall submit any questions it may have regarding this Solicitation or the Solicitation process via the Sourcing Tool's Message Board using the provided Vendor Question Template. Written questions concerning this Solicitation will be received until the date and time listed in the Schedule Section of this Solicitation. [Vendor Question Submission Template.xlsx](#)

[Delete](#) [Excel Import](#) [Excel Export](#) (*) indicates a required field

- The **'Add Attachment'** page will display, and the attachment will automatically be assigned **3.3**. Attach the completed **'Addendum'** document in the **'Attachment'** field. The name of the document will auto-populate the name of the new section. Add a **'Description'** to let the vendors know this is where they can find the answers to their questions and click **'Done.'** The newly added section **3.3** will now display with the **'Addendum'** document attached for the vendors to review. Click **'Next.'**

Doc82296023 - Example Sourcing Event

On this page you create the information that participants will read and respond to during events. Add different types of content to re-create the traditional [More](#)

All Content [Filter](#) Display: [Edit Item](#) [Actions](#) [List](#) [Dropdown](#)

☐ Name

3 Solicitation Document and Details

3.1 This document includes details on the intent, use, duration, and scope of the solicitation process and instructions on how to respond, and the State's terms and conditions. [Completed Solicitation Doc.docx](#)

3.2 Vendor Question Template - Vendor shall submit any questions it may have regarding this Solicitation or the Solicitation process via the Sourcing Tool's Message Board using the provided Vendor Question Template. Written questions concerning this Solicitation will be received until the date and time listed in the Schedule Section of this Solicitation. [Vendor Question Submission Template.xlsx](#)

3.3 Addendum answering vendor questions [Example Sourcing Event Addendum.doc](#)

[Prev](#) [Next](#) [Exit](#)

A new section 3.3 is added with the 'Addendum' document attached for the vendors. Click 'Next' to finalize the addition.

NC eProcurement

Managing a Sourcing Event

STATE DEPARTMENT STATE BRANCH
LOCAL GOVERNMENT CITY COUNTY
COMMUNITY COLLEGE PUBLIC SCHOOL
NORTH CAROLINA ePROCUREMENT PURCHASE
ONLINE SHOPPING STATEWIDE TERM CONTRACT
ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

- The **'Pending Changes'** will display in the **'Summary'** section where the user can review the change before finalizing it by clicking **'Update'** in the top right.

Event Doc82296023 - Example Sourcing Event

Prev **Update** Exit

Review and revise your event. Your edits have been already saved. When you finish, you can launch the event or leave it as a draft for future edits.

Content Changes **1 Change pending**

Published Version	Draft Version	Diff Type	Responses Removed	Details
3.3 Addendum answering vendor questions	Example Sourcing Event	Added	No	

Participant Changes

Contact Name	Item Name
No items	

Review the **'Pending Changes'** and if correct, click **'Update.'**

- A final review page will display giving the user four options for handling any responses that may have already been submitted by vendors. **'Keep and email,' 'Keep, but do not email,' 'Do not keep, and email,'** and **'Do not keep, and do not email.'** Select the option that makes the most sense given the situation per guidance from P&C and add a brief message in the box to let the vendors know that an **'Addendum'** has been added. Click **'Update Event'** to officially attach the **'Addendum,'** and the user will be given the option to return to the Event or go the Project.

Event Doc82296023 - Example Sourcing Event

Cancel

Depending on the changes that you made, responses that participants have already submitted may no longer be valid. For [More](#)

Choose an option for participants' responses:

☒ **Keep and email** - Keep participants' existing responses and send an email to participants, notifying them that they should review their previously submitted responses to ensure that they are still accurate.

Include an additional message in the notification (optional)

Please see the Addendum added to section 3 of the Event to address previous questions. Thank you.

Max. 2000 characters

☐ **Keep, but do not email** - Keep existing responses, but do not send an email to participants.

☐ **Do not keep, and email** - Discard existing responses, but send an email to participants.

☐ **Do not keep, and do not email** - Discard existing responses and do not send an email to participants.

Certain users receive notification emails regardless of the option selected.

- Any Participants added or removed during the update.

Update Event

Choose the best of the four options for handling any responses that have already been submitted, add a message to let the participants know an **'Addendum'** was added, and click **'Update Event.'**

- A new message will automatically post to the Event message board to notify internal responders of the **'Addendum,'** but the user should also go back to IPS at this time and post an **'Addendum Notification'** for the public to see.

VII. Reviewing Responses and Requesting Clarification or a BAFO

When the Event reaches the response due date, the event status becomes **'Pending Selection.'** At this point the user can begin to open the **'Envelopes'** to review the responses.

1. When the bidding is closed, the Event will go to a **'Pending Selection'** status. At that time, the user can click the **'Actions'** button in the top right (obscured by the popup menu in the image below) and select **'Open Envelopes'** to begin to review the bids.

When the Event goes to **'Pending Selection'** status, the user can select **'Open Envelope'** from the **'Actions'** dropdown menu on any Event tab to begin reviewing the vendor responses.

Doc82296023 - Example Sourcing Event

Overview Content Log Scenario

Overview

ID: Doc82296023

Description: Health Care Services Example ⓘ

Status: Pending Selection ⓘ

Version: V4

Timing

- Reopen Event
- Close Event
- Cancel Event

Document

- Edit
- Open Envelope
- Choose suppliers for next envelope
- Excel Export
- Print Event Information
- View Publish Approval Task

2. The **'Open Envelope Confirmation'** page will display a list of the participating vendors. Click **'Open Envelope'** to compare the responses for the vendor information contained in **'Envelope 1.'** Pricing information is not displayed until **'Envelope 2'** is opened.

Open Envelope Confirmation

You are about to open envelope 1 of 2 in this event.

Selected Participants Review Envelope Content

Selected Participants

Organization Name ↑ Contact Name

NC Test Vendor ▾

Click the **'Open Envelope'** button to see the **'Envelope 1'** responses for the all vendors who responded.

Open Envelope Cancel

Organization Name	Contact Name	Locked	Status
NC Test Vendor		No	Participated

3. Navigate to the **'Content'** tab if not already there and scroll down to see the **'Envelope 1'** responses revealed to the right of Sections 4, 6, and 7. The vendor's name will display at the top of the column, and if there are several responses, the user will have to keep scrolling to the right to see them all.

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QUOTE PURCHASER CATALOG
SOURCING
BIDDING
BUY

On the **'Content'** tab, the **'Envelope 1'** icon is now open, and the vendor responses are now visible to the right of the questions. Note the vendor's name at the top of the column. Only one set of responses is visible here, but scrolling to the right would show other vendor responses for **'Envelope 1.'**

- Doc82296023 - Example Sourcing Event

Overview **Content** Suppliers Discovery Suppliers Messages Log Scenario Award

All Content [Filter](#)

Name ↑
▼ 5 Pricing Submittal ▼

This section contains the pricing questions that the State is seeking responses from Vendors.

Timing

Close Event

Cancel Event

Document

Edit

Open Envelope

Choose suppliers for next envelope

Excel Export

Print Event Information

View Publish Approval Task

Selection

Actions ▼

Test Vendor

- 16

NC eProcurement

Managing a Sourcing Event

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ELECTRONIC VENDOR PORTAL HUB CERTIFIED V
QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

Choose suppliers for the next envelope

Only responses of the suppliers you choose will be visible in the next envelope

Select Participants Review Envelope Content

Invited Participants

Organization Name ↑ Contact Name

NC Test Vendor

Unseal Next Envelope Cancel

Select the vendors for which to see the contents of 'Envelope 2' by checking the box next to their name (in this example only one vendor has been selected, but in most situations, multiple vendors will be chosen) and click 'Unseal Next Envelope.'

- Back on the 'Content' tab, click the 'Actions' button and select 'Open Envelope' from the dropdown menu.

Doc82296023 - Example Sourcing Event

Overview Content Suppliers Discovery Suppliers Messages Log Scenario Award

All Content

Name ↑

Totals

Welcome to the State of North Carolina's Sourcing Tool

Timing

Close Event

Cancel Event

Document

Edit

Open Envelope

Choose suppliers for next envelope

Excel Export

Print Event Information

View Publish Approval Task

Selection

Actions

Click the 'Actions' button again and select 'Open Envelope' to see the contents of 'Envelope 2.'

- The 'Open Envelope Confirmation' page will display listing all participating vendors. Click 'Open Envelope' to compare the responses for the pricing information contained in 'Envelope 2.'

Open Envelope Confirmation

You are about to open envelope 2 of 2 in this event.

Selected Participants Review Envelope Content

Selected Participants

Organization Name ↑ Contact Name

NC Test Vendor

Open Envelope Cancel

Click the 'Open Envelope' button to see the 'Envelope 2' responses for the selected vendors.

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QUOTE PUNCHOUT CATALOG
PURCHASE ORDER
SOURCING
BIDDING
BUY

- On the **'Content'** tab, **'Envelope 2'** in Section 5 is now open. On the right side the user will now see the Pricing Response documents the vendors uploaded. Click on the attachment and select **'Download this attachment'** from the popup to download and review the pricing submittals.

Note: There is an option in the **'Actions'** dropdown menu to **'Download All Supplier Attachments'** where users can mass-select vendors and sections and download everything all at once.

Overview **Content** Suppliers Discovery Suppliers Report Messages Log Scenario Award Actions

All Content Filter

Display: Responses

Initial NC Test Vendor

Name 1

5 Pricing Submittal

This section contains the pricing questions that the State is seeking responses from Vendors.

5.1 Pricing Submittal - Vendor shall download, complete, and upload the completed Attachment A: Pricing Submittal Workbook Excel file that is available by clicking on References at the end of this item. Vendor shall follow the instructions on the first worksheet of the Excel file, and complete the multiple worksheets in the Excel file. References

6 Vendor Response

This section contains the information that the State is asking the Vendors to provide responses.

Vendor Pricing

Download this attachment

- Before fully reviewing and evaluating all responses against each other, take the information gathered and create a **'Preliminary Bid Tabulation with Vendor Name and Product ID Only'** and post that on IPS.

Note: The **'Report'** tab on the Event has a button called **'Download Reports.'** Selecting **'Question and Terms Report'** may help in providing a list of all vendors who responded in Excel format.

- While reviewing the vendor responses, it may be necessary to seek clarification with certain vendors or request a BAFO. This communication will be made through the Event message board. Navigate to the **'Messages'** tab and click the **'Compose Message'** button at the bottom of the screen.

urement - TEST SourcingUser01 State Supplier (no value) NC eProcurement - TEST has

urement - TEST SourcingUser01 Participants (0) Team (0) (no value) Event Example Sourcing Eve

View Reply Delete Associate Labels Compose Message Download all attachments

- On the **'Compose New Message'** page, select the recipients of the message. Unlike adding an **'Addendum'** where the audience is everyone, in a situation where the user is seeking clarification or a BAFO, the message will likely be directed to a smaller group of participants, if not just one. Click the radio button next to **'Selected Participants,'** enter a more specific **'Subject,'** and write an informative message in the body. Attach a **'Request for Clarification'** form (the template for which can be found in the **'Sourcing Project Documents'** folder on the **'Documents'** tab of the Project). Then click **'Select Participants'** to narrow down the recipient group.

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Managing a Sourcing Event

Compose New Message

From: NC eProcurement - TEST (SourcingUser01)

To: ☐ All Active Participants ☒ Selected Participants ☐ All Team Members ☐ Selected Team Members

Subject: Seeking Clarification on Bid

Labels: (no value) select

Attachments: Request for Clarification.docx Delete

Attach another file

Please fill out the attached Request for Clarification document and return with specific answers. Thanks.

Select the radio button next to 'Selected Participants' to limit the recipients of the message. Once the 'Subject' and message have been updated, and the attachment has been added, click the 'Select Participants' button.

- The 'Select Participant For Message' popup will display, and the user can select to which vendor(s) the message should be sent; next, the user can click 'OK,' and then click 'Send' back on the 'Compose New Message' page. The new message will display on the 'Messages' tab, and the user will wait for a response from the selected vendor before making any more decisions.

Select Participant For Message

Invited Participants

Organization Name	Contact Name	Invited by	Incumbent	Response Team	Locked	Status
NC Test Vendor		SourcingUser01	No	Yes	No	Participated

OK Cancel

Select the specific vendor(s) to receive the message and click 'OK.'

- If the user needs to request a BAFO from a specific vendor, the request will begin with a targeted message as demonstrated above, but the user should attach a 'Request for BAFO' form instead of a 'Request for Clarification' form. In a 'Lite' Sourcing Project, there is no 'Task' associated with requesting a BAFO (there is in a 'Full' Sourcing Project), but a 'Request for BAFO Template' document is available on the 'Documents' tab of the Project.

VIII. Awarding the Solicitation

After all information has been received and considered, the user can develop an 'Award Recommendation' and post the final Bid Tabulation and Award Notification on IPS. The Event has 'Scenario' and 'Award' tabs on it, but those are not used at this time. All decisions will be made offline with the information gathered in the Event, though the 'Award Recommendation Template' can be found on the 'Documents' tab of the Project.

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- Once all the information has been gathered from the Event and all input has been considered, the user should go to the '**Documents**' tab on the Project and download the '**Award Recommendation Template**' from the '**Sourcing Project Documents**' folder. It should be completed with information about the winning bid and re-uploaded onto the '**Documents**' tab for historical purposes.

Example Sourcing Services Project ID: WS82296004
Sourcing Project Tasks: Incomplete Tasks: 0
Current Phase: 01 - LAUNCH PROJECT

Overview **Documents** Tasks Team Message Board Event Messages History

Example Sourcing Services Project Show Details Actions

Name	Owner	Status
▼ Sourcing Project Documents ▼	Project Owner	
▼ Proposal Evaluation Kick-Off Meeting Template ▼	Project Owner	Not Edited
▼ Addendum Document Template ▼	Project Owner	Not Edited
▼ Category Sourcing Strategy Template ▼	Project Owner	Not Edited
▼ Request for Clarification Template ▼	Project Owner	
▼ Request for BAFO Template ▼	Project Owner	
▼ Award Recommendation Template ▼	Project Owner	Not Edited
▶ Solicitation Document ▼	Project Owner	
▶ Sourcing Event ▼	Project Owner	
▶ Document Templates ▼	Project Owner	

Download, complete, and re-upload the '**Award Recommendation Template**.'

- Take the completed '**Award Recommendation**' document, along with a final, detailed Bid Tabulation (for which there is not template in the Project) and post both documents in IPS.
- Now that solicitation has been awarded, return to the Event to close it. Even though an award has been issued, the status will still read '**Pending Selection**' because the award was determined outside of the Event. To manually close the Event, click the '**Actions**' button in the top right and select '**Close Event**.'

Doc82296023 - Example Sourcing Event

Overview **Messages** **Actions**

Select '**Close Event**' from the '**Actions**' dropdown to manually close the Event.

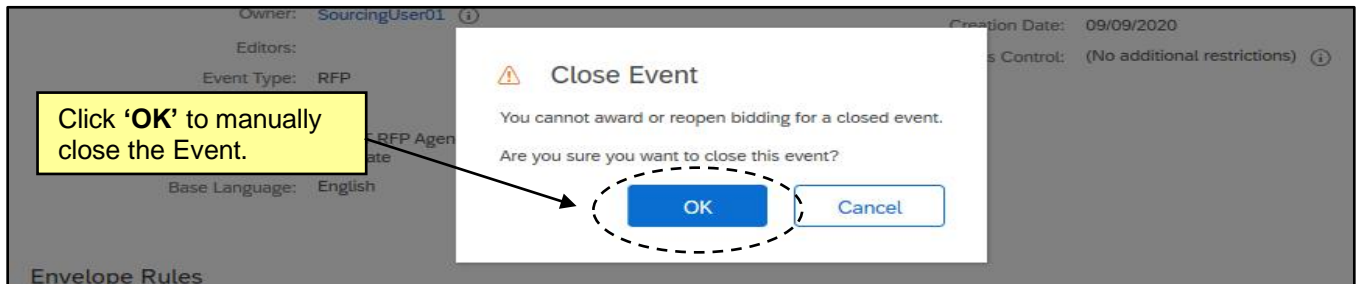
ID: Doc82296023
Description: Health Care Services Example
Status: Pending Selection
Version: V4

Timing
Close Event
Cancel Event
Document
Edit
Open Envelope
Choose suppliers for next envelope
Excel Export
Print Event Information

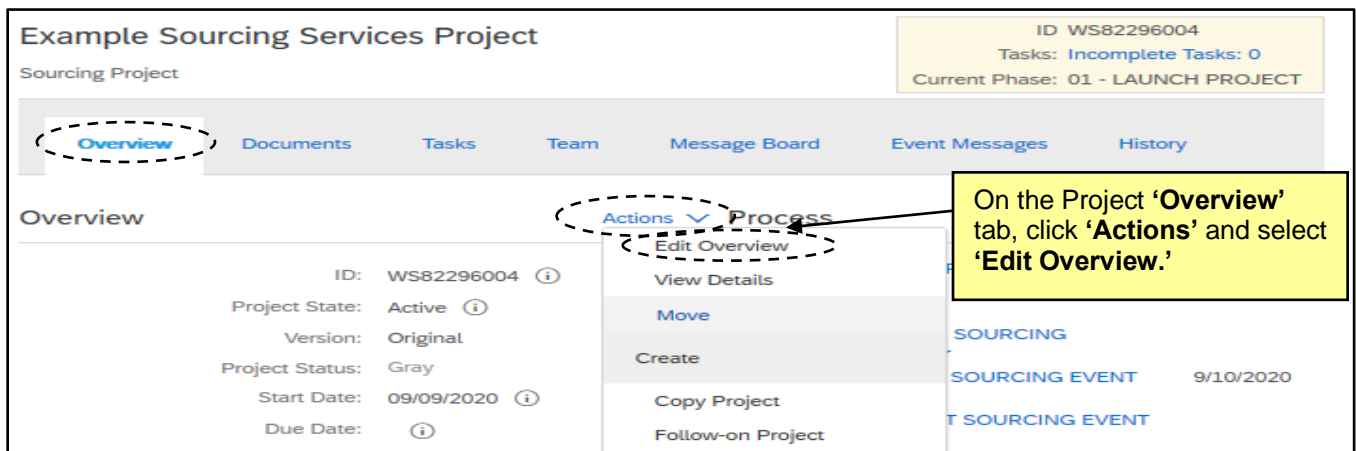
NC eProcurement

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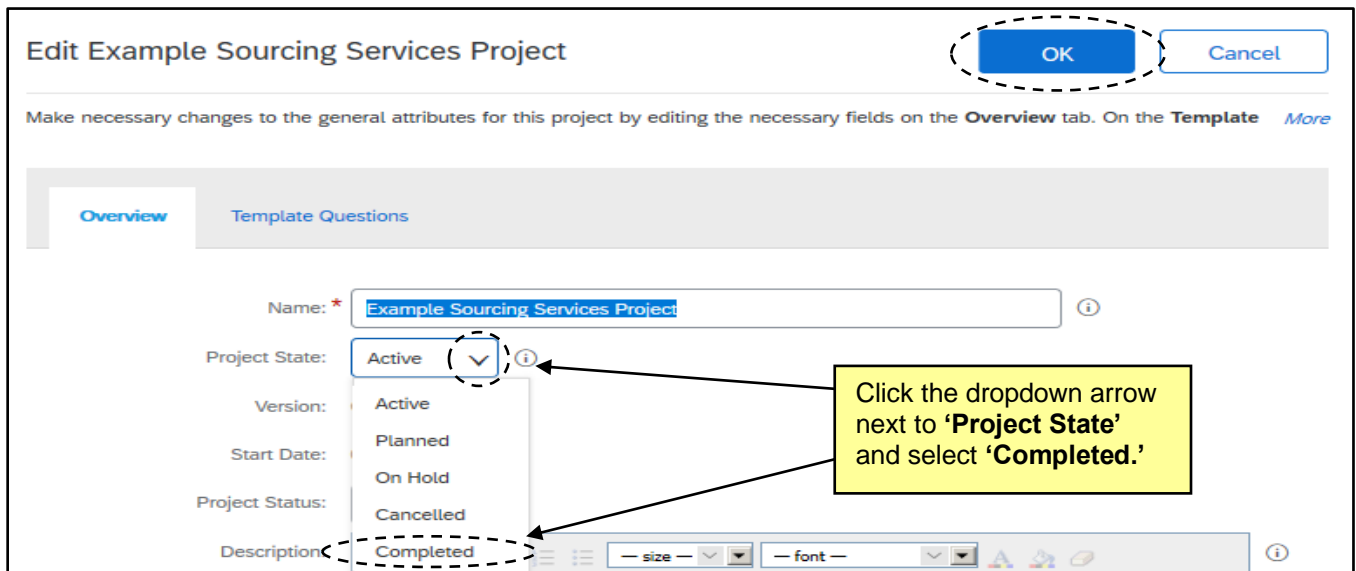
- The **'Close Event'** warning will display reminding the user that **'Closed'** Events cannot be reopened, which is okay because they can still be accessed for important historical information. Click **'OK.'**



- The Event status will update to **'Completed.'** Now navigate back to the **'Overview'** tab of the Project to mark that as **'Completed,'** too. Click **'Actions'** at the top of the **'Overview'** tab and select **'Edit Overview'** from the dropdown menu.



- On the next page, click the dropdown next to **'Project State'** and select **'Completed,'** then click **'OK.'**



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- The Status of both Project and Event will now reflect **'Completed'** and will display as such in the **'My Documents'** portal on the **'Sourcing'** tab. The next step will be to create a **'Contract Workspace'** from the completed Sourcing Project.

Both the 'Sourcing Project' and 'Sourcing Event' display as 'Completed' in the user's 'My Documents' portlet.

Event Status (Last 12 months)				
	RFI	RFP	Auction	Forward Auction
Draft	2	46	0	0
Preview	0	0	0	0
Open	0	3	0	0

From	Subject	Received
SourcingUser01	Event Example Sourcing Event - Envelope 2 can now ...	9/11/2020 8:02 AM
SourcingUser01	Event Example Sourcing Event - Envelope 1 can now ...	9/11/2020 4:27 AM